RDA EUROPE SYNCHRONISATION ASSEMBLY

14th June 2016 (13:00 – 16:00 CEST)

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The notes below include a summary of the discussion during the call as well as any questionnaire responses that were received on that topic (in **blue text**). *A short summary of the topic is included at the end of each topic.*

Web Link: https://rd-alliance.org/sya-meeting-tuesday-14th-june-2016-1300-cest-supporting-material

AGENDA, DISCUSSION & SUMMARIES

1. Purpose of the meeting is to discuss with RDA E stakeholders about RDA global and RDA Europe functions. The input on functions needed for continuation of RDA Europe are highly appreciated.

First question: Do we need an RDA support programme RDA Europe, or should we only have one centralized RDA global?

Discussion notes:

- RDA Europe has the opportunity to organize financial support from the EC, which might not be possible if we only had RDA global. With a global centralized project we should develop a funding scheme for it. Funding of the current regional RDA activities could be directed directly to the global project.
- We have to understand things which are customized to European needs. It goes also to the country level. In the end, we could think of successive levels working together. Some of us use RDA Europe for activities that are customized to a local framework – what would be lost if this did not exist anymore? If we list functions that we need, it would help in determining what we want to do.
- How can we ensure the coordination between the regions works properly so that the organization as a whole functions well? This is not the case currently.
- It is not black and white, but it is a matter of balance, and the balance needs to be shifted. The development is going from distributed to more coordinated effort, and thus the secretariat needs to be stronger and we need to put more funding to the centralized function.
- The broad range of current services: how to deal with this in the global/European levels, how do new services like the European Open Science Cloud fit into the picture? On the other hand, how do we define services? There are things that are on a global level, we need to understand how we share work, there are things that need to go to the secretariat.
- RDA needs to understand its **unique value, using the capacities of different regions**, getting benefits out of voluntary work etc.
- Awareness of RDA needs to be improved across Europe. The European dimension is important, not only in the research domain but across the public sector. The European RDA

has an important role to play. The EOSC: need to interface with the many policies that we need to build the framework, but we need to be careful when defining the services and the EOSC needs to fit this. Tailoring global services to the European level, and vice versa, should also be looked into.

- The most important issue is to **raise awareness across European research and public sector organisations** about the activities of the RDA and good data management practices + dovetail to the many related policy initiatives that are taking place in Europe: Open data, open science, open cloud, Free Flow of Data etc. all under the umbrella of the Digital Single Market.
- There is a need for a European dimension in RDA global. Main differences between other countries (perhaps with exception of AU) EU has a structured funding programme, there are also many activities that need to be synchronized on a global scale. EOSC, EUDAT, OpenAIRE, ERICs in the ESFRI process – are these yet in a systematic focus of RDA Europe? It might be useful to **do demarcation work**: who does what, where are the focuses, etc.

Questionnaire responses (6 complete): All 6 stated that we should have a European RDA support program (RDA Europe). Explicative comments received:

I think we need continued support at European level for RDA. At present the only effective way to do this has been to have a European project, which works with the US project and the Australian input. The Australians seem to have greater flexibility in how they contribute to the global project. If there were an easy way for all funders to contribute to an RDA global that might have advantages, but it will be necessary for some years to come for money spent in Europe to contribute to activities which benefit Europe - including helping Europeans attend events elsewhere in the world, supporting attendance from developing countries to events in Europe, and helping engagement with relevant activities within Europe, whether commission-funded or not.

Should have national, regional and global RDAs but there needs to be a clear remit for each level, coordination and ensure work isn't repeated. RDA Europe is important and requires engaging with the EU Commission and being involved in relevant projects (e.g. EOSC, OA, RDM). RDA Europe should have a clear role for experts to support these areas of work and actively participate in EU-funded projects. Must not repeat work done elsewhere but be engaged.

Yes a European dimension and an RDA Europe support program is needed but this needs to become more flexible without many formalities such as formal deliverables. The deliverables need to be aligned with the RDA Global goals and possibly some strategic European-only reports would suffice.

Also the regional perspective needs to be strengthened identifying regions in Europe and having funded effort for each region (for outreach, support, etc.) and then try to get an army of national contact points (including also unfunded effort)."

Funding schemes are very hard to make truly international. Many research infrastructures have a principle of "juste retour". European, and potentially national, funding for RDA activities can show a proper focus and (in)directly influence the directions taken in the global organization.

"Europe has its EU RI projects, RDA Europe should ALSO have a liaison function, taking care that those projects participate at the right level with RDA. Also some 'small' proof-of-concept & prototyping implementation projects for RDA results where possible in collaboration with the EU RI would be extremely useful.

Next to that there can be a role for RDA EU to interact with the national science orgs (or national RDA initiatives)."

> Summary: RDA & RDA Europe have a unique value on a pan-European and national / local level which should be capitalised upon. The different services offered should be clarified / defined, localised as well as tailored to European needs. The most efficient and flexible RDA EU structure should be sought within the limits of the funding instrument.

2. The summary of the previous meeting

There were no pending issues or discussions on this topic.

3. Discussion on functions and services for future RDA

Currently we are in the RDA Europe 3 phase, where se have a major investment in the data practitioner engagement. In the RDA Europe 4 we need a slightly different view. A certain amount of resources are used in RDA Europe 3 – are they used in a way that reflects the needs of data practitioner engagement?

Discussion notes:

- We need to adapt. We spend too much on personnel, we should **focus** more on services and support functions, changing the balance towards the global secretariat. We have to be leaner.
- RDA Europe is **less visible in EU countries where there are no project partners**. However it is not only this: RDA depends very much on personal engagement and inspiration, that goes beyond the money streams and this poses challenges also in countries that have partners. Of course in non-partner countries the situation is even worse. **New tools/services/functions** are needed to address this.
- Participation in RDA meetings globally: There are countries that are not partners that have contributed, e.g. Austria and Netherlands. Plenary hosting could give a good momentum on a national and regional level, and also an opportunity to bring in new partners. It could also be useful to interview people from different places, in order to understand the viewpoints of peoples coming from different backgrounds.
- The national activities, ideas of **national sections, localization** is planned for addressing the issue of local needs. There will be RDA National pages on the RDA Global web site
- We need to ensure that **stakeholder engagement** stays, this is a pan-European activity.
- There is a constructive, collaborative structure - the outside view (RDA EU towards RDA Global) …
- The inside view (RDA in Europe): a national open access desks model in OpenAIRE: possibly a full coverage of European countries, resulting in a complex project scheme, being able to say that is participatory and involves all. Social networking / social engineering arena action was to nominate national contacts and on top of that a regional coordinator (North / South / East / West). A further exercise could be to **look at these kind of models**, what could be learnt and what would be interesting for RDA.
- Services or no services? If RDA remains as a more social platform then perhaps the service aspect gets lost. If services: **what are the services, what is the real drive**? This should be agreed upon. RDA is good and successful in the brand building and community engagement.
- RDA EU is now building national spaces and listing national contact points on the RDA website, aiming for strengthening the RDA message on a national level – somewhat like the

"OpenAIRE idea". The follow-up, consistency, communication, interaction with the national actors is important. We need to find multipliers that could support us. In the meantime, pragmatically, the partners are covered, but we should also cover the countries that are not presented in the consortium at the moment.

- A further model to assess is the EGI example: federated approach, geographical links etc.
- On the other hand, the RDA is about data in general, not only about one function. Thus we have to make sure, that national contacts have to have the capacity to cover the different aspects of RDA (technical, sociological, software expertise-related etc…) We need prototyping and assessment for this.
- RDA is very much linked with infrastructure. We have to realize and accept that different countries are proceeding in different phases, they have different challenges and different priorities. We cannot go out with the same messages to all countries, but instead try to help people with concrete examples that fit their specific needs.

Questionnaire responses:

- **RDA EU is working well but always can do better. Improve outreach and engagement beyond the RDA communities that are well represented at plenary meetings. Ensure processes are clear and transparent.**
- **"Yes a European dimension and an RDA Europe support program is needed but this needs to become more flexible without many formalities such as formal deliverables. The deliverables need to be aligned with the RDA Global goals and possibly some strategic European-only reports would suffice.**
- **Also the regional perspective needs to be strengthened identifying regions in Europe and having funded effort for each region (for outreach, support, etc.) and then try to get an army of national contact points (including also unfunded effort)."**
- **Funding schemes are very hard to make truly international. Many research infrastructures have a principle of "juste retour". European, and potentially national, funding for RDA activities can show a proper focus and (in) directly influence the directions taken in the global organization.**
- **"Europe has its EU RI projects, RDA Europe should ALSO have a liaison function, taking care that those projects participate at the right level with RDA. Also some 'small' proof-of-concept & prototyping implementation projects for RDA results where possible in collaboration with the EU RI would be extremely useful.**
- **Next to that there can be a role for RDA EU to interact with the national science orgs (or national RDA initiatives)."**

Summary: RDA Europe should assess the different national models / structures that exist to understand what could be a good model for RDA in European countries. Localisation must be borne in mind and service definition is essential to go beyond the social community platform.

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4. Do you think we should European-only activities in RDA or should we just support Europeans participating in RDA Global activities?

Are the working groups and interest groups working well? How could we from the European side improve the participation in the RDA global work?

Discussion notes:

- RDA **should not fund the practitioners'** work. This should be funded through projects. We still need some kind of support for people to engage in the RDA. The issue is to define the

right level of financial support. The specific needs should be identified as well. The groups might need some kind of support to e.g. meet between the plenaries. We need to see also more meetings and collaboration between IG/WGs and other actors outside RDA, finding the common denominator and balance between the RDA pragmatic view and possibly other kinds of approaches. Maybe the EOSC could be open enough to be able to cover this?

- Is it necessary to have your own money to be able to be something? RDA cannot be a vehicle for bigger investments, but rather as a possibility for **seed money** for small things. The seed money should push the Europeans to participate in the RDA and take advantage of it.

Questionnaire responses (6 complete): Do you think we should European-only activities in RDA or should we just support Europeans participating in RDA Global activities?.

- **I think we need continued support at European level for RDA. At present the only effective way to do this has been to have a European project, which works with the US project and the Australian input. The Australians seem to have greater flexibility in how they contribute to the global project. If there were an easy way for all funders to contribute to an RDA global that might have advantages, but it will be necessary for some years to come for money spent in Europe to contribute to activities which benefit Europe - including helping Europeans attend events elsewhere in the world, supporting attendance from developing countries to events in Europe, and helping engagement with relevant activities within Europe, whether commission-funded or not.**
- **Both, with emphasis to RDA Global, outreach to Europe**
- **There should be EU-only activities where necessary, but if these have a global impact then there should be support to participate in the RDA Global activities. Should have national and regional events to engage with the community as the main plenaries are often difficult to attend for most people.**
- **A mixture of European-specific activities and a bit of RDA Global (as it is now) but with more focus on good support.**
- **Should have national, regional and global RDAs but there needs to be a clear remit for each level, coordination and ensure work isn't repeated. RDA Europe is important and requires engaging with the EU Commission and being involved in relevant projects (e.g. EOSC, OA, RDM). RDA Europe should have a clear role for experts to support these areas of work and actively participate in EU-funded projects. Must not repeat work done elsewhere but be engaged.**
- **One of the strengths of RDA is "democratization". Not only HPC and petabyte problems are handled, but there is also interest in the long tail, education of weak groups and data rescue. Furthermore, RDA brings together funders, librarians, publishers and researchers to solve the issues together. RDA funds can best be used to ensure a balanced view. Implementation pilots are a good example where this can work especially in favour of small projects, of which there are many.**

Summary: RDA Europe should not fund practitioners to work on RDA WG / IGs. That is a matter for their institute or other projects. The EU project should support testing & implementation like seed money as well as offer travel support for plenary meetings. RDA EU members should be encouraged to include effort for their RDA work in EU funded projects etc.

Is the secretariat working well and how could we support it though RDA Europe?

Discussion notes:

- Could be staffed in a different way, developing ways of working etc. Recently services have been shared, also a global communications plan has been drafted
- **Centrally organized secretariat** has probably more pros than cons.
- At the moment there are people who are available depending on the projects, working on top of their own work, and that makes it challenging.
- The support could be through sub-contract to the RDA foundation
- One example: A continuous coherent multi-stakeholder communication is more than a full-time job. However, currently nobody on the secretariat has time to do that.
- We are still in a similar stage than when we started, and as the RDA has changed and developed, we should also develop the secretariat.
- We need to have a good analysis or plan, on what can be done centrally, how far can we go?
- Currently there is a fragmentation in the secretariat. We need to address this, and also assess, do we have the right people, and to deal with the possible needs.
- For any future actions regarding RDA Europe, we need to look at the secretariat. One remark: the **communication/dissemination** and secretarial work is not perceived as important as it actually is in many projects, and this is a risk.
- Re. secretariat here are some small things that we can improve: 1. Hiring an administrative assistant with some web CMS skills 2. Hire some persons via the RDA Foundation so that there is more control by the Secretary General (which is not the case) 3. Dedicate more work on the global level (rather have secretariat members write RDA Europe deliverables and we do quite some of these) - So we need to cut down also on formal deliverables and align with global/have only some EU strategic reports
- There are more and more groups in the administration, we should look into the whole picture also in terms of communication. **Good communications** are essential, we can't achieve coordination and engagement without good communications
- Another requirement is dedicating a person to adoption ... interviewing and interacting providing more technical support & advice. Perhaps a broker type person between the producers of the recommendations & outputs and the potential end users & indeed other stakeholders
- Supporting RDA is supporting the individuals.
- RDA EU is a Coordination & Support Action (CSA). The call text says "*European support to the Research Data Alliance, RDA: Proposals are expected to support the development of global interoperable research data infrastructures that will greatly benefit the coordination at European level addressing all the points below. The objective is (a) support to the RDA secretariat for logistics, open access to RDA reference documents and dissemination activities b) support the emergence of building blocks of an open, interoperable data infrastructure fostering interoperability across regions, organisations and scientific disciplines; (c) support ESFRI infrastructures and new communities to engage in Open Science and data sharing principles. In particular, the proposal activities should provide financial support of the organisation and coordination of European stakeholders' active participation and contribution to the Research Data Alliance.*" The proposal can add to that but it must at least cover this.*

Questionnaire responses:

- **There still seem to be issues for the Secretariat, with problems brought about because what should be a single global team ends up reporting through multiple management chains. I think this makes it harder for RDA's leadership, in particular the Executive Director, than it needs to be.**
- **The secretariat needs to be strengthened with an administrative assistant (combing also skills on web CMS) and also more control from the RDA Secretary General. The**

involvement of the RDA Foundation in the project hiring some secretariat members need to be explored.

Summary: The secretariat should be centrally organised with regional contributions and synergies. Communication is very essential to achieve engagement and coordination goals, including broadening the base and raising awareness with new communities.

What could be done to improve the TAB, the Council and OAB? Are there any low hanging fruit for looking in the RDA Europe 4?

Discussion notes:

- TAB needs support from the Secretariat. We need to have enough support for TAB people for participating in plenaries etc.
- TAB, OAB and Council need sufficient administrational support.
- TAB are providing effort for free - they need paid support staff to maximise the value from their limited free effort
- The council has discussed the creation of sub-groups to use peoples' time more efficiently => need for even more administrational support.
- Expanding support to purely research organisations. How to deal with this? Looking through the individual members to see which of them are relevant for OAB – how to find resources for this labour-intensive task?
- TAB work is done on a voluntary basis, on top of the daily work. The TAB people are completely booked.
- And note also that most OAB members are paying a fee, we need to maximise the support to get more value.
- We have to understand that it is difficult to manage
- Agility required, understanding of European project management
- What are the processes, where to locate which knowledge? E.g. how deep does the secretariat have to go in knowledge of e.g. group topics? Where to put the content and who are the key people, what kind of expertise do we need, how to bring the right people together?
- The people with the content view: we might have to give them some money.

Questionnaire responses:

- **RDA Global could use some architecture guidance/recommendations. Until now this has not happened which can be explained and defended due to the start-up phase, we need as many activities as possible etc. However we are now moving into a new phase where (for interoperability and clarity sake) some guiding principles should be promoted to be taken over by all WG and IGs where it makes sense more than now. This guidance can come from TAB (A: advisory->architecture), but perhaps another body would better suited. e.g. give DF a special role? - some weeding might be necessary in the WG & IG landscape - discourage sales pitches and pure project presentation in favour of conceptual, policy and technical work**

Summary: The secretariat should be in a position to support these groups and have skilled staff and sufficient resources to provide more consistent and continuous support to TAB, OAB, and Council. The volunteer effort / resources dedicated should not be underestimated and must be

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supported with whatever means the contract / structure will allow. Agility in "on-boarding" experts at different times / moments which is not easy under the current EC funding structure.

The liaison with different kind of stakeholders: policy level, e-infrastructures, practitioners etc. How we have we succeeded and how should we go about this in the future?

Discussion notes:

- Policy stakeholders and senior research staff engagement work has been successful in RDA. The focus is changing, awareness is growing. However we do not have concrete enough messages to attract practitioners, ESFRIs etc. We need to shift the focus to practitioners.
- There are certain topics that have raised attention among practitioners, but in general we need to understand better the output landscape, to be able to provide the right information. Communication tools are very important.
- In this meeting there should be more stakeholders.

Summary: Stakeholder engagement is important, focus is changing and awareness of different issues is critical. Having the correct tools and experts to communicate the outputs according to the different stakeholders is critical.

Is the SyA working well?

Discussion notes:

- Both education representatives and other stakeholders are missing
- The Synch Assembly might not be attractive for people who are looking for opportunities?
- Functions should be assessed and defined.

Questionnaire responses: The SyA feels as if it is still in its early stages and needs careful support and encouragement to help it do its job better in future. The fact that it exists at all is an improvement.

Summary: the synchronisation assembly needs to have a broad coverage of the different stakeholders. The functions and expectations from this group should be assessed and perhaps redefined.

5. The next steps:

- Necessity to organize a F2F meeting.
- We should ask some of the key people about the SyA functionality.
- We need to openly discuss what we need, looking ahead to RDA Europe 4. We should have some documents for basis of discussion.